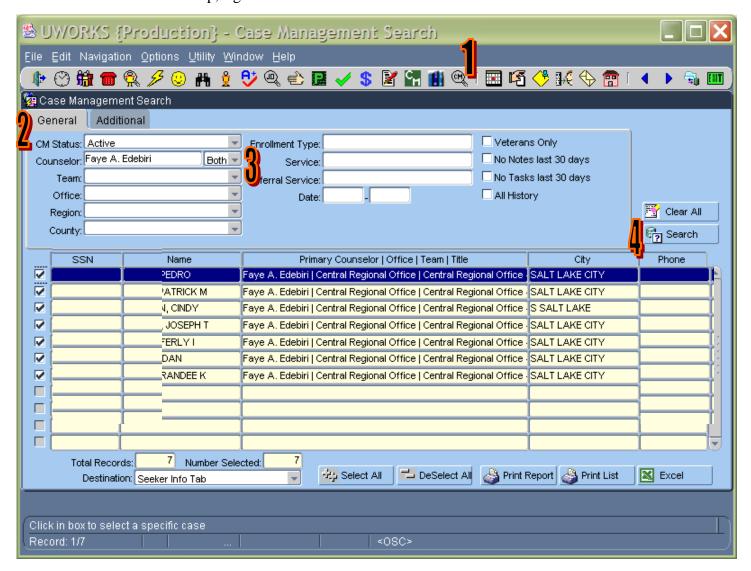
## **Caseload Management Customer Report (CMCR)**

## From UWORKS:

- 1. Select Customer Miscellaneous from CM Magnifying Glass Speed Button
- 2. CM Status: Active
- 3. Counselor: Enter CTW Specialist, Select Both from drop down box
- 4. Select Search at the top, right hand side of the screen



## **Review all cases on CMCR Report to find the following:**

- 1) Last Note within 30 days
- 2) Next Appointment Date or Next Contact Date
- 3) External Counselor Listed
- 4) Searchable is marked Yes
- 5) Service is blank (Employment Plan)
- 6) Service on Employment Plan
- 7) Employment Plan Date and Hours
- 8) Enrollment/Possible Enrollment

## **ACTIONS**

Review all cases on CMCR Report to find the following:

- 1) Last Note within 30 days
  - a. 30+ need to contact client and narrate
- 2) Next Appointment or Contact
  - a. If none set, contact and set appointment or task and narrate
- 3) External Counselor Listed
  - a. If none listed, add External Counselor on Counselor Information Screen
- 4) Searchable is marked Yes
  - a. If marked No, is client appropriate for CTW? Mark Y on Placement Screen
- 5) Service is blank (Employment Plan)
  - a. No Service, set appointment to create plan and narrate
- 6) Service on Employment Plan
  - a. CTW Primary
  - b. CTW Expanded
  - c. Follow Up CTW open minimum of 90 days, maximum 12 months
    - i. 90+ days still employed, can close Follow Up Service: "Completed" for successful closure and add to your Monthly #'s Placement List
    - ii. Under 90 days, quit/terminated, etc. close Follow Up Service:
      - "Did Not Complete" and open new CTW Primary or Expanded Service
- 7) Employment Plan Date and Hours
  - a. 6+ months Staff case and narrate Consider other options:
    - i. OJT, Internship,
    - ii. Refer back to VR or DWS Counselors if client needs a job coach, further training, or is not ready or willing to work
  - b. If client lost or quit job before 90 days, close Follow Up Service: "Did Not Complete" and reopen CTW Primary or Expanded Service
  - c. General guide for participation hours on plan:
    - i. if working full time enter 40 hrs/wk
    - ii. if job searching part time enter 10-15 hrs/wk
    - iii. if job searching full time enter 25-35 hrs/wk
- 8) Enrollment/Possible Enrollment
  - a. If working with DWS Counselor, staff with them to update plan with appropriate CTW Services (CTW Primary, CTW Expanded, Follow Up CTW)
  - b. DWS Counselor is the primary Counselor on the case, CTW is the Secondary
  - c. Staff with DWS for special participation requirements